

# Justin Norvell, CFA

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## Professional Summary

CFA-chartered analytics and business systems professional with 20 years of experience in financial services, including Charles Schwab and TD Ameritrade. Background in reporting, workflow optimization, stakeholder-driven product enhancements, and regulated brokerage operations, with experience translating business and regulatory requirements into scalable processes, dashboards, controls, and user-ready solutions.

## Core Skills

Business systems analysis, requirements gathering, workflow mapping, acceptance criteria, UAT, release support, reporting and analytics, dashboard maintenance, data validation, trend monitoring, issue triage, process documentation, financial services operations, brokerage workflows, regulatory workflow implementation, Reg BI support, Salesforce, CRM Analytics, Excel, Jira, Confluence, OneNote. Professional certification in: SQL, Tableau, Python, R, AI.

## Professional Experience

### Charles Schwab

**Senior Specialist, Business Systems Analyst** | Jun 2021 – Dec 2023

- Maintained and supported Salesforce reporting during the Schwab-TD Ameritrade integration, analyzing cross-platform data to help ensure continuity for retail distribution workflows.
- Monitored data and business process issues during integration work, partnering with technology teams to identify risks, support resolution, and improve reporting reliability.
- Collaborated with stakeholders and technical teams on data migration and system alignment in support of integrated sales workflows.

**Product Specialist, Retail Systems** | Aug 2019 – Jun 2021

- Gathered business requirements for Salesforce enhancements from frontline sales teams and documented them as Jira tickets with acceptance criteria.

- Participated in Agile refinement with developers and served as an Agile ambassador to support accurate delivery of enhancements.
- Collaborated with QA to develop testing plans and led business UAT for Salesforce releases, including planning and final sign-off.
- Drove CRM workflow consolidation and requirements gathering following the Scottrade-TD Ameritrade merger, helping streamline sales tracking across teams.
- Spearheaded Salesforce CRM Analytics upgrade requirements and prototyping for executive dashboards designed to provide real-time business insights.
- Helped operationalize Reg BI in a brokerage environment, partnering with business and compliance stakeholders to support the translation of regulatory requirements into operational workflows, reporting, and process controls.

### **Retail Systems Specialist | Oct 2016 – Aug 2019**

- Built and maintained customized Salesforce reports and dashboards with role-based data views for sales reps, branch managers, regional leaders, and executives.
- Supported recurring monitoring of sales performance, pipeline, gross assets, and territory trends through dashboard and reporting solutions.
- Performed routine review of reporting outputs, helped identify issues and discrepancies, and coordinated follow-up with Sales Ops, Product, and development teams through a dedicated support inbox.
- Created Salesforce training manuals and tracked user inquiries and complaints in OneNote to identify process improvements and support frontline adoption.
- Supported Salesforce enhancements tied to sales contests, bank channel reporting, and strategic initiatives in partnership with business and technology teams.

## **TD Ameritrade**

### **Senior Bank Strategy Specialist | Sep 2010 – Oct 2016**

- Designed annual TDA-TDB scorecards, market breakdowns, and sales contests that enabled leaders to develop targeted strategies and strengthen bank partnership alignment.
- Created dashboards that resolved economic reporting discrepancies in partnership with TD Bank stakeholders.
- Supported commercial reporting tied to bank channel performance, scorecards, and strategy tracking.

### **Investment Consultant, Client Service Specialist | May 2006 – Sep 2010**

- Developed Salesforce tools for local use that later scaled to support managers, regional leaders, and divisional leaders.

- Used Excel formulas, pivot tables, lookups, and conditional formatting to validate reporting outputs and support recurring analysis.
- Earned awards for client service excellence.

## **Education & Certifications**

- CFA Charterholder.
- HarvardX PH125.1x Data Science: Building Machine Learning Models, verified certificate, 2021.
- Google AI Professional Certificate, completed Apr 2026.
- IBM Data Analyst Professional Certificate.
- Kaggle project: Cyclistic bike-share analysis using Python for data analysis and visualization.